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# **LIFE-SHARE Project: Developing a Digitisation Strategy Toolkit**

Beccy Shipman<sup>1</sup>, Matthew Herring<sup>2</sup>, Ned Potter<sup>1</sup>, Bo Middleton<sup>1</sup>,

<sup>1</sup> Health Sciences Library, University of Leeds, Leeds, LS2 9JT, UK, <sup>2</sup>J.B.Morrell Library,  
University of York, York, YO10 5DD, UK.

b.shipman@leeds.ac.uk, mh43@york.ac.uk, e.potter@leeds.ac.uk,  
m.m.middleton@leeds.ac.uk

**Abstract.** This poster will outline the Digitisation Strategy Toolkit created as part of the LIFE-SHARE project. The toolkit is based on the lifecycle model created by the LIFE project and explores the creation, acquisition, ingest, preservation (bit-stream and content) and access requirements for a digitisation strategy. This covers the policies and infrastructure required in libraries to establish successful practices. The toolkit also provides both internal and external resources to support the service. This poster will illustrate how the toolkit works effectively to support digitisation with examples from three case studies at the Universities of Leeds, Sheffield and York.

**Keywords:** digitisation, digital lifecycle, toolkit, strategies, libraries

## **1 Introduction**

The LIFE-SHARE project received funding from JISC in September 2009 to explore digitisation across the three White Rose Universities of Leeds, Sheffield and York. The project runs from September 2009 to February 2011. The aim of the project is to identify and establish institutional and consortial strategies and infrastructure for the creation, curation and preservation of a variety of digital content.

Digitisation is a complex procedure, or rather a complex network of parallel procedures. The work of the LIFE-SHARE Project is based on all aspects of the digital content lifecycle. The Project has adopted one of the current lifecycle models for digital content from the LIFE project [1] and uses this to analyse current practices within institutions and across the consortium. Each of the partner libraries is engaged in digital content creation, for a variety of purposes, and there is a growing need to understand costs and benefits across the digital content lifecycle. The adoption of the lifecycle model ensures that the LIFE-SHARE Project identifies costs and institutional/consortial strategies for all aspects of digital content curation and preservation.

Across the digital content lifecycle, required skills range from project management to the preparation of exacting technical specifications, and from assessing the needs of users to constructing media-specific metadata profiles. To add to this complexity, different skills are drawn upon within different contexts – digitisation of printed material within the day-to-day activities of an academic library is likely to be a very

different to a special-funded and time-limited digitisation project. The status, nature and condition of materials may also call for highly bespoke digitisation skills. The 2007 JISC Digitisation Conference at Cardiff [2] emphasised the need to describe the nature of these interdisciplinary skills along with current training provision. The LIFE-SHARE Project directly addresses this need by working with project partner, JISC Digital Media, to assess the skills required for the creation, curation and preservation of digital content and match these requirements with current training provision available to the UK's academic community.

The Ithaka report, 'Sustainability and Revenue Models for Online Academic Resources' [3] identified compelling reasons to collaborate on digital content creation, curation and management – both within and across institutions. The LIFE-SHARE Project, being a consortial project, is well-placed to explore both institutional and consortial strategies to support digitisation activities, and the wealth of expertise across the partner institutions will ensure that the project outcomes will capitalise on the pooling of experiences – for the benefit of the wider community.

## **2 Methodology**

The design of the Digitisation Strategy Toolkit involves an iterative process. The first stage is a digitisation audit; this is followed by the drafting of a provisional toolkit. Case studies at the three institutions form the second stage of the project, focusing on different aspects of the digital lifecycle. The work from these case studies is then used to inform the next version of the toolkit. In the third stage, the project addresses the question of consortial models for offering digitisation services. The work from this will contribute to the creation of the final version of the toolkit. Throughout this process, the toolkit has been circulated to digitisation practitioners in the Higher Education community for evaluation and comment.

## **3 Digitisation Audit and Skills Map**

An audit of all digitisation across the three White Rose Libraries has been completed. The audit took the form of a review of digitisation services, and an inventory of all activities involving digitisation across the lifecycle. The review of services revealed that the three universities offer very similar services, particularly on-demand digitisation for access to course reading materials and for access to archive materials and project based digitisation for selected collections. However, the development of the services differed significantly between the institutions.

The inventory of all digitisation activities across the three institutions provides an invaluable resource. It contains lists of staff members' skills and expertise, equipment, strategies, digital collections and potential collections. The inventory supports the results of the services review in that there are significant amount of similar work occurring across all three institutions. It has also revealed some gaps in the provision of service and expertise, such as the ability to scan materials larger than A2 and a lack of capability in the area of Encoded Archival Description (EAD).

The skills and training maps have been developed to enable users to identify the skills needed for the type of digitisation they are planning. Users can carry out a knowledge check to help inform their choice of training.

## **4 Case Studies**

There are three case studies, one based at each of the three White Rose institutions. For each study there is a particular emphasis on a slightly different stage of the digital lifecycle, though all take into consideration the issues involved at every stage.

The Leeds case study investigates the costing and workflow for digitising print monographs for preservation purposes. The focus is on a comparison between the costs of the conservation of physically deteriorating monographs from the early twentieth century and the costs of producing and preserving digital copies of the same monographs.

The Sheffield case study investigates the workflow for digitising audio and video recordings from Special Collections with a particular focus on the permissions required for preservation and dissemination.

The York case study investigates the workflow for providing on-demand digitisation services for online course readings and archive materials. The study explores the two strands of on-demand digitisation and develops workflows for each strand. Different approaches to the ways in which the two strands may collaborate and combine services have also been considered.

## **5 Consortial Models**

This stage of the project draws on the first 2 stages to establish whether the White Rose University Libraries could use shared expertise and equipment to provide a consortial digitisation service. A number of different models have been created to address both on-demand and project based digitisation. The models allow the institutions to address any gap in service or expertise by drawing on the consortium.

## **6 Strategy Toolkit**

The final stage of the project draws on all previous stages to create the Digitisation Strategy Toolkit. This work has been carried out concurrently with the other stages to enable the development and updating of the toolkit as the project progresses.

The toolkit essentially provides a framework for producing a digitisation strategy. This uses the structure of the LIFE model, exploring each stage of the digital lifecycle: creation, acquisition, ingest, content preservation, bit-stream preservation and access. For each of the lifecycle elements the toolkit looks at the policies, infrastructure, and resources (internal and external) necessary to support digitisation strategy.

### **6.1 Policies**

This section outlines the existing Library policies that can inform the creation of a digitisation strategy. These policies may provide source material for the strategy, or the digitisation strategy may be written into these policies. Where possible the toolkit links to examples of existing university policies available online.

## **6.2 Infrastructure**

This section outlines the infrastructure necessary to support digitisation. Most of the items under this section will be unique to the institution, such as staff or available equipment. However, where it is possible, sources of infrastructure that are available to multiple institutions, for example JORUM, are linked to.

## **6.3 Resources**

This section draws most heavily on the work of the case studies, audit and skills maps. The resources offer reusable best practice guidelines, technical standards and costings for undertaking digitisation, created from our experiences in the case studies. The equipment and staff lists from the audit also form a core part of the internal resources. Whilst these are lists are unique to the White Rose institutions, the methodology for creating them can be replicated at other institutions. The skills map provides a workflow for anyone undertaking a digitisation project, assessing the user's skills and providing links to a wide range of external training materials.

# **7 Conclusions**

The creation of a digitisation strategy is an essential part of the work libraries must carry out in order to manage their digital and print collections in the long term. The strategy should be based on a thorough understanding of both existing digitisation work and potential future digital collections. It is important to integrate the digitisation strategy with other existing policies such as those relating to preservation and copyright and IPR. The strategy must also address all stages of the digital lifecycle, from creation through ingest to long term preservation. The LIFE-SHARE Digitisation Strategy Toolkit provides a useful model for institutions to use, that will enable the development of a fully integrated policy as well as providing links to external sources of best practice, advice and training.

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